

Survey of Virginians

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Study Background and Method

In the spring of 2004, the Virginia Department of Alcoholic Beverage Control contracted with the VCU Center for Public Policy to conduct a telephone survey with a representative sample of Virginians. The survey was conducted April 8-18, 2004 with 820 adults aged 21 years and over. A similar survey was conducted in April of 2002 to monitor citizen satisfaction with agency performance.

The questionnaire included questions on:

- I. Problems and Needs in the Community
- II. Awareness of ABC Services and Programs
- III. Policy Opinion
- IV. Customer Satisfaction with ABC Stores
- V. Web Site Usage

Summary of Findings

Problems and Needs in the Community

- Underage use of tobacco products was more likely to be considered to be a big or moderate problem in the community than other problems considered. The over-selling of alcohol to patrons at bars and restaurants was the least likely to be considered a big or moderate problem.

	Big or Moderate Problem	Small Problem or None at all
Underage tobacco use	64%	24%
Drunk driving	56%	34%
Underage drinking	54%	28%
Over-selling to patrons	28%	50%

- While underage tobacco use is seen as a problem by more than six in ten Virginians, most think that current efforts to stop the sale of tobacco to those under 18 are about right. About four in ten Virginians didn't know enough about this to give an opinion. Of those with an opinion, those who think Virginia is doing too little are outnumbered by about 2 to 1. Just 4% of the public thinks the state is doing too much on this.
- Eight in ten Virginians believe that access to alcohol by minors comes from friends and relatives. Only 10% think that stores and restaurants are the most common source of alcohol to underage persons.
- Over half of the public (56%) believes they are very likely to report a business seen selling alcohol to minors. When asked where they would make such a report, the most common response was to the police or sheriff.

- Fewer respondents (37%) believe themselves very likely to report parents or other adults serving alcohol to teenagers. The most common response was to report this kind of observation to the police or sheriff.

	Very Likely to Report
Business selling alcohol to minors	56%
Parents or adults serving alcohol to teenagers	37%

Awareness of ABC Services and Programs

- Public awareness of ABC programs and services is highest for printed materials related to alcohol laws. 41% have heard of publications or brochures from the Department. Awareness was lowest for the toll free number to report violations and agents speaking at community events; 19% have heard of these.

	Heard of Before	Not Heard of
Publications	41%	57%
Educational programs	34%	41%
Law enforcement division in Dept.	31%	67%
ABC agents speaking at events	19%	79%
Toll free number	19%	80%

Policy Opinion

- Eight in ten Virginians think it would be a bad or very bad idea to allow grocery and convenience stores to sell liquor (in addition to beer and wine). Among those negative towards this idea, the most common reaction was that access to alcohol would be too easy. 16% thought this was a good or very good idea. The most common reaction among this group was that selling liquor in grocery and convenience stores would be more convenient for consumers.
- About four in ten (42%) think a system of privately operated liquor stores would be worse than the current system, 32% think it would make no difference, and 17% think the private system would be better.

Customer Satisfaction with ABC Stores

- About half of Virginians (52%) say they purchase liquor or Virginia wines at the ABC stores.
- More ABC store customers considered product variety to be excellent or very good than any other dimension rated. 46% said that variety was excellent or very good, 39% said it was good and 9% said it was fair or poor.
- The convenience of store hours was the least likely to be rated in positive terms. Two in ten consider store hour convenience to be excellent or very good, 46% say hours are good, and 27% think they are fair or poor.

	Excellent or Very Good	Good	Fair or Poor
Variety of products available	46%	39%	9%
Customer service	43%	41%	13%
Store layout and design	35%	46%	12%
Convenience of store locations	28%	51%	18%
Convenience of store hours	20%	46%	27%

- About half of Virginians (51%) are extremely or very satisfied with the customer service provided by ABC stores. 42% are satisfied and just 5% are not too or not at all satisfied with the customer services at the stores.
- About half of Virginians experience no trouble finding the products they are looking for at ABC stores. 51% say they always find what they are looking for. 36% find what they are looking for most of the time. Ten percent say they find what they are looking for sometimes, rarely, or never.
- When customers have trouble finding the product they are looking for, the most common response is to ask for assistance. 62% say they would ask for assistance in this situation. 15% say they would choose a different brand of liquor in their preferred size while 9% would be brand loyal, choosing a different size product. 11% say they would leave without a purchase in that situation.
- After taking into account requests for assistance, the most likely action of customers who don't find what they are looking for are as follows: 36% of ABC customers would choose another brand in the same size, a third would choose another size in their preferred brand, 23% would leave the store without a purchase, and 5% would special order their preferred product.
- Thirteen percent of ABC customers have made a special trip to another state or to a military base store in order to buy liquor. 87% of customers have not done this.
- 36% of ABC customers think they are very or somewhat likely to make use of ABC store hours on Sundays. 63% think they are not too or not at all likely to do so.

Web Site Usage

- Approximately 1% of all Virginians report having used the ABC web site.

Survey Method

The Survey of Virginians was conducted by telephone with representative sample of Virginians, aged 21 years and over April 8-14, 2004. Interviewing was conducted by telephone from the facilities of the Survey and Evaluation Research Laboratory at Virginia Commonwealth University in Richmond. The interviewing was conducted by a staff of professionally trained, paid interviewers using computer-assisted telephone interviewing software.

The sample of telephone numbers was prepared by Genesys Sampling Systems of Ft. Washington, Pennsylvania, and was designed so that all residential telephones, including new and unlisted numbers, had a known chance of inclusion. The cooperation rate for the survey was 46 percent. Using the Council of American Survey Research Organization (CASRO) response rate calculations, interviews were obtained with respondents in 40 percent of the known or assumed residential households in the sample.

The data were weighted to adjust for unequal probabilities of selection due to multiple telephone lines and multiple adults living in the household. In addition, the data were weighted on sex, race, age, and region of residence to reflect the demographic composition of the Virginia adult population. Percentages reported in the text and tables are weighted, while the number of cases shown in the tables for various subgroups is the actual number of respondents.

Questions answered by the full sample of adults are subject to a sampling error of plus or minus approximately 4 percentage points at the 95 percent level of confidence. This means that in 95 out of 100 samples like the one used here, the results obtained should be no more than 4 percentage points above or below the figure that would be obtained by interviewing all adult Virginians with telephones. Where the answers of subgroups are reported, the sampling error would be higher. Because of nonresponse (refusals to participate, etc.), standard calculations of sampling error are apt to understate the actual extent to which survey results are at variance with the true population values. Surveys are also subject to errors from sources other than sampling. While every effort is made to identify such errors, they are often difficult or impossible to measure. Readers making use of the results are urged to be mindful of the limitations inherent in survey research.

Survey of Virginians

April 8-18, 2004

820 Respondents

Margin of sampling error +/- 4 percentage points

I. Problems and Needs in the Community

Q1. How much is drunk driving a problem in your community-is this a big problem, a moderate problem, a small problem, or none at all?

	2004	2002
Big Problem	22%	18%
Moderate Problem	34%	37%
Small Problem	24%	24%
None At All	10%	9%
Don't Know	10%	11%
No Answer	1%	0%

Q2. How much is underage drinking of alcoholic beverages a problem in your community-is this a big problem, a moderate problem, a small problem, or none at all?

	2004	2002
Big Problem	24%	28%
Moderate Problem	30%	30%
Small Problem	19%	18%
None At All	9%	8%
Don't Know	18%	16%
No Answer	0%	0%

Q3. How much of a problem is over-selling of alcohol to patrons by bars and restaurants in your community—is this a big problem, a moderate problem, a small problem, or none at all?

	2004
Big Problem	11%
Moderate Problem	17%
Small Problem	28%
None At All	22%
Don't Know	22%
No Answer	1%

Q4. When underage persons drink, would you say they most often get that alcohol from friends, from relatives or from stores and restaurants?

	2004	2002
Friends	73%	69%
Relatives	7%	8%
Stores and Restaurants	10%	11%
Don't Know	10%	12%
No Answer	1%	1%

Q5. How much is the use of tobacco products by those under 18 years old a problem in your community-is this a big problem, a moderate problem, a small problem, or none at all?

	2004	2002
Big Problem	32%	35%
Moderate Problem	32%	27%
Small Problem	17%	16%
None At All	7%	8%
Don't Know	11%	13%
No Answer	0%	0%

Q6. Do you think what we're doing in Virginia to stop the sale of tobacco to those under age 18 is too much, too little, about right or don't you know enough about this to say?

	2004	2002
Too Much	4%	2%
Too Little	19%	24%
About Right	38%	47%
Don't Know Enough to Say	39%	26%
No Answer	1%	1%

Q7. If you observed a business selling alcohol to minors, how likely would you, personally, be to report that business-very likely, somewhat likely, not very likely, or not at all likely?

	2004	2002
Very Likely	56%	51%
Somewhat Likely	21%	27%
Not Very Likely	12%	10%
Not At All Likely	8%	8%
Don't Know	2%	3%
No Answer	1%	1%

Q8. If you wanted to report something like this, where would you go first?

	2004		2002
Police/Sheriff	59%	Police/Sheriff	55%
Dept of ABC	8%	Dept of ABC	10%
ABC Web	1%	ABC Web	1%
ABC Hotline	2%	ABC Hotline	1%
Store other or manager	9%	Other (included store manager and parents of child in 2002)	13%
Parents of child (if possible)	1%	Don't Know	19%
Other	5%	No Answer	1%
Don't Know	14%		
No Answer	0%		

Other responses to Q8 in 2004	Frequency Count
ABC store	1
Arlington county online website.	1
ATF	1
Better Business Bureau	9
Commonwealth attorney's office	2
Community address	1
Congress	1
Congressman	1
Consumer hotline	1
County authority	1
Courthouse	1
CPS child protective services, social services	1
District attorney	1
Family member	2
Friend for advice	2

Other responses to Q8 in 2004	Frequency Count
Go to the FDA	1
He'd never tell/wouldn't report	5
Would go on the web to find a regulatory commission in Richmond	1
Internet	3
Look through the phone book/ yellow pages to get #	1
Non emergency hotline	1
Phone directory	1
Public health	1
State website	1
Telephone	1
Tobacco and firearms	1
Town council	1
Would call the county or city hotline	1
Number of other responses	45

Q9. If you knew of parents or other adults providing alcohol to teenagers, how likely would you be to report it --very likely, somewhat likely, not very likely, or not at all likely?

	2004
Very Likely	37%
Somewhat Likely	32%
Not Very Likely	17%
Not At All Likely	10%
Don't Know	2%
No Answer	2%

Q10. If you wanted to report something like this, where would you go first?

	2004
Police/Sheriff	58%
Parents/adults providing alcohol	15%
Dept of ABC	3%
ABC Web	1%
ABC Hotline	1%
Other parents of teens being provided with alcohol	2%
Other	8%
Don't Know	11%
No Answer	1%

Other responses to Q10 in 2004	Frequency Count
A source on the internet/online	3
ABC store	1
Blue pages phone book	1
Call the county or city hotline	1
Child protective services	3
Child welfare social services	1
Commonwealth attorney's office	1
Commonwealth attorney, charges to be filed.	1
Consumer hotline	1
Courts/juvenile judge	1
Do research first to find the most applicable #	1
Domestic relations	1
Family/children services	1
Would not go anywhere/wouldn't report	7
I would go to the parent (unclear which parent—parent providing alcohol or other parent)	1
Juvenile authorities	1
Juvenile courts.	1
My mom	1
Other friends.	1
Pastor	1
Report it to the school	4
Social services	26
Talk to the child being given the alcohol.	1
Telephone book	1
The coke unit	1
The Governor	1
The store manager.	1
Number of other responses	65

II. Awareness of ABC Services and Programs

Next, we'd like to know if you have heard of some of the services and programs offered by the Department of ABC. For each, please tell me whether or not you have heard of this before. First,

Order of items was randomized for Q11 to Q15.

Q11. A law enforcement division in the Dept. of ABC? (Have you or haven't you heard of that before?)

	2004	2002
Yes, Heard Before	31%	35%
No, Haven't Heard Before	67%	63%
Don't Know	2%	2%
No Answer	0%	0%

Q12. A toll free phone number where you can report suspected violations of ABC laws? (Have you or haven't you heard of that before?)

	2004	2002
Yes, Heard Before	19%	20%
No, Haven't Heard Before	80%	78%
Don't Know	1%	2%

Q13. Educational programs by the Department of ABC on the safe and responsible use of alcohol? (Have you or haven't you heard of that before?)

	2004	2002
Yes, Heard Before	34%	41%
No, Haven't Heard Before	63%	56%
Don't Know	3%	3%
No Answer	0%	0%

Q14. ABC Department agents speaking at community events? (Have you or haven't you heard of that before?)

	2004	2002
Yes, Heard Before	19%	25%
No, Haven't Heard Before	79%	73%
Don't Know	1%	2%
No Answer	0%	0%

Q15. Publications or brochures about alcohol laws by the Department of ABC? (Have you or haven't you heard of that before?)

	2004	2002
Yes, Heard Before	41%	46%
No, Haven't Heard Before	57%	52%
Don't Know	2%	1%
No Answer	0%	0%

III. Policy Questions

Now on a different topic.

Q16. Currently, Virginia government owns and operates the liquor stores, known as ABC stores. One proposal is to allow private retailers to own and operate liquor stores. Overall, do you think allowing private retailers to own and operate liquor stores would be better, worse, or no different than the current system of state owned and operated ABC stores?

	2004	2002
Better	17%	15%
Worse	42%	43%
No Different	32%	32%
Don't Know	8%	7%
No Answer	1%	3%

Q17. Why do you think that?

Responses recorded verbatim and coded into the categories below.

AMONG THOSE SAYING BETTER	Percent
Convenience/Easier access for Consumers	8%
Better regulation to limit access to minors	2%
Public Safety and Regulation better by private	15%
Better prices	13%
Free Enterprise/Competition	28%
Government should not be involved in alcohol sales	15%
ABC stores too much for the state to handle	4%
Doesn't matter/why not	0%
Public Safety and Regulation better by state	1%
Other	11%
Don't know	1%
No answer	1%
Number of cases	151

AMONG THOSE SAYING WORSE	Percent
Free Enterprise/Competition	0%
Fake ids for minors easier to use	1%
Easier for minors to steal alcohol	0%
Easier for minors to buy alcohol	21%
Public Safety and Regulation better by state	47%
Access to liquor would be too easy	12%
Lost revenue for state of Virginia	1%
Profit motive for private business/retailers	10%
Opposed to Alcohol	1%
Minors will still obtain alcohol	1%
Other	4%
Don't know	2%
No answer	0%
Number of cases	344

AMONG THOSE SAYING NO DIFFERENCE	Percent
Better prices	0%
Free Enterprise/Competition	0%
Government should not be involved in alcohol sales	1%
Public Safety and Regulation better by state	1%
Access to liquor would be too easy	0%
Minors will still obtain alcohol	17%
Public Safety and Regulation no difference	23%
Same people going to buy	3%
Same people will work there	0%
Makes no difference	37%
Opposed to Alcohol	0%
Other	4%
Don't know	10%
No answer	3%
Number of cases	265

Q18. Some people think grocery and convenience stores that currently sell beer and wine should also be allowed to sell liquor. Do you think this is a very good idea, a good idea, a bad idea, or a very bad idea?

	2004	2002
Very Good Idea	2%	5%
Good Idea	14%	11%
Bad Idea	43%	28%
Very Bad Idea	37%	50%
Don't Know	3%	4%
No Answer	1%	2%

Q19. Why do you think that?

Responses recorded verbatim and coded into the categories below.

AMONG THOSE SAYING VERY GOOD OR GOOD IDEA	Percent
Convenience/Easier access for Consumers	44%
Have it in other states	4%
Better regulation to limit access to minors	2%
Public Safety and Regulation better by private	2%
Better prices	2%
Free Enterprise/Competition	7%
Doesn't matter/why not	9%
Already sell beer/wine	14%
Makes no difference - good idea	7%
Easier for minors to buy alcohol	0%
Public Safety and Regulation better by state	1%
Other	4%
No answer	4%
Number of cases	127
Fake ids for minors easier to use	1%

AMONG THOSE SAYING BAD OR VERY BAD IDEA	Percent
Easier for minors to steal alcohol	6%
Easier for minors to buy alcohol	25%
Public Safety and Regulation better by state	16%
Access to liquor would be too easy	22%
Lost revenue for state of Virginia	0%
Profit motive for private business/retailers	1%
Opposed to Alcohol	3%
The environment of the store will change	4%
Makes no difference - bad idea	0%
Doesn't belong in a grocery store	6%
Exposes youth/children to alcohol	3%
Other	6%
Don't know	2%
No answer	5%
Number of cases	657

Q20. The Department is planning to offer ABC store hours on Sundays in some locations. Do you think this is a very good idea, a good idea, a bad idea, or a very bad idea?

	2004
Very Good Idea	3%
Good Idea	29%
Bad Idea	30%
Very Bad Idea	29%
Don't Know	4%
No Answer	5%

IV. Customer Satisfaction with ABC Stores

Q21. Do you ever purchase liquor or Virginia Wines from an ABC store?

	2004	2002
Yes	52%	49%
No	48%	50%
Don't Know	0%	0%

Q22 to Q38 ASKED OF THOSE WHO SAY YES TO Q21**Number of respondents=433 (labeled here as “ABC Customers”)**

Q22. As I mentioned, the Department is planning to offer store hours on Sundays in some locations. How likely would you be to use an ABC store on Sundays—very likely, somewhat likely, not too likely, or not at all likely?

Asked of ABC Customers	
	2004
Very Likely	11%
Somewhat Likely	25%
Somewhat Unlikely	24%
Very Unlikely	39%
Don't Know	0%

Next, I'd like you to rate the ABC stores on each of the following. First,...

Q23. to Q27. asked in randomized order.

Q23. The variety of products available in ABC stores? (Would you say the variety of products available in ABC stores is excellent, very good, good, fair, or poor?)

Asked of ABC Customers		
	2004	2002
Excellent	21%	16%
Very Good	25%	31%
Good	39%	32%
Fair	7%	10%
Poor	2%	3%
Don't Know	6%	6%
No Answer	0%	0%

Q24. Store layout and design? (Would you say the store layout and design is excellent, very good, good, fair, or poor?)

Asked of ABC Customers		
	2004	2002
Excellent	11%	13%
Very Good	24%	26%
Good	46%	43%
Fair	9%	9%
Poor	3%	2%
Don't Know	7%	6%
No Answer	0%	1%

Q25. Convenience of store hours? (Would you say the convenience of store hours is excellent, very good, good, fair, or poor?)

Asked of ABC Customers		
	2004	2002
Excellent	6%	8%
Very Good	14%	20%
Good	46%	42%
Fair	20%	14%
Poor	7%	7%
Don't Know	6%	8%
No Answer	1%	0%

Q26. Convenience of store locations? (Would you say the convenience of store locations is excellent, very good, good, fair, or poor?)

Asked of ABC Customers		
	2004	2002
Excellent	9%	11%
Very Good	19%	25%
Good	51%	43%
Fair	12%	13%
Poor	6%	6%
Don't Know	3%	2%
No answer	0%	0%

Q27. Customer service? (Would you say customer service is excellent, very good, good, fair, or poor?)

Asked of ABC Customers		
	2004	2002
Excellent	17%	19%
Very Good	26%	27%
Good	41%	37%
Fair	10%	9%
Poor	3%	3%
Don't Know	4%	3%
No Answer	0%	1%

Q28. How often do you find what you are looking for when you go to an ABC store-always, most of the time, sometimes, rarely, or almost never?

Asked of ABC Customers		
	2004	2002
Always	51%	50%
Most of the Time	36%	39%
Sometimes	8%	6%
Rarely	0%	1%
Almost Never	2%	1%
Don't Know	2%	2%
No Answer	1%	0%

Q29. If you go to an ABC store and do not find the product you are looking for on the shelf, which of these are you most likely to do- ask for assistance, choose another brand of liquor in your preferred size, choose the same brand of liquor in another size, or leave the store without a purchase?

Asked of ABC Customers		
	2004	2002
Ask for Assistance	62%	55%
Choose Another Brand	15%	18%
Choose Another Size	9%	9%
Leave Without Purchase	11%	16%
Don't Know	1%	3%
No Answer	1%	1%

Q30 (IF ASK FOR ASSISTANCE) After asking for assistance, if the store does not have the product you are looking for, which of these are you most likely to do-- choose another brand of liquor in your preferred size, choose the same brand of liquor in another size, leave the store without a purchase, or special order the product?

**Asked of ABC Customers
Among those saying Ask for Assistance in Q29**

	2004
Choose Another Brand	34%
Choose Another Size	38%
Leave Without Purchase	17%
Special order	9%
Don't Know	2%
No Answer	0%

Asked of ABC Customers

Combined responses to Q29 and Q30	2004
Choose other brand	36%
Choose other size	33%
Leave without purchase	23%
Special order	5%
Not sure or No answer	4%

Q31 Overall, how satisfied are you with the customer service provided by ABC stores—extremely satisfied, very satisfied, satisfied, not too satisfied, or not at all satisfied?

Asked of ABC Customers

	2004
Extremely satisfied	15%
Very satisfied	36%
Satisfied	42%
Not too satisfied	4%
Not at all satisfied	1%
Don't Know	2%
No Answer	1%

Q32 How many times in the past 12 months have you made a special trip to another state or to a military base store in order to buy liquor?

Asked of ABC Customers

	2004
None, Zero times	87%
1	1%
2	3%
3	3%
4	2%
5	1%
6	0%
7 or more times	3%

Q33. (IF ONE OR MORE TIMES) How much money did you spend on liquor on your most recent trip?

Summary of Q33 Responses		Percent
	\$5-\$25	31%
	\$26-\$50	33%
	\$51 and up	31%
	Don't Know or No Answer	4%
	Number of cases	59
	Mean dollars spent (values range from \$5 to \$800, standard deviation =79.9)	\$59.25

Q34. (IF ONE OR MORE TIMES) Which of these is the main reason you made a special trip in order to buy liquor—convenience of store hours, selection of products, price, or case discounts?

	Percent
Convenience of store hours	18%
Selection of products	30%
Price	36%
Case discounts	8%
Other (volunteered)	6%
No answer	1%
Number of cases	59

Other responses volunteered to Q34	
	closer because he is on NC border
	just there for another purpose
	vacation
	visiting out of town

V. Web Site Usage

Q35. Have you ever used the ABC web site?

	Frequency Count	Percent
Yes	8	1%
No	812	99%
Total	820	100%

Please tell me if you ever used the ABC web site for each of the following:

Q36. to Q38. asked in randomized order. Asked only if Q35=Yes.

Q36. Product or pricelist information? (Have you ever used the ABC web site to find product or pricelist information?)

	Frequency Count
Yes	3
No	5
Total	8

Q37. Store hours or location information? (Have you ever used the ABC web site to find store hours or location information?)

	Frequency Count
Yes	3
No	5
Total	8

Q38. Educational information on alcohol laws or the safe and responsible use of alcohol? (Have you ever used the ABC web site to find educational information on alcohol laws or the safe and responsible use of alcohol?)

	Frequency Count
Yes	1
No	7
Total	8